



Strategic
Marketing &
Research, Inc.

TRAVEL MONTANA

**WINTER CAMPAIGN –
CONVERSION RESEARCH**

AUGUST 2004

BACKGROUND & METHODOLOGY

As part of its Tourism & Recreation Strategic Plan, Travel Montana aims to increase four-season tourism revenues by bringing more people to the State throughout the year. As part of this strategy Travel Montana's 2003/2004 marketing effort included two specific efforts to attract winter visitors: one was aimed at skiers and snowboarders, and the other was targeted at snowmobilers.

These two efforts were successful in generating interest and inquiries, as over 30,000 consumers responded. Nonetheless, the ultimate goal of the marketing is to generate visitation – most importantly, during the winter months. To investigate the impact of these marketing efforts, conversion research was implemented with the following informational objectives:

- **Measure the overall impact of each advertising effort** with regard to the percentage of visitor conversion and visitor spending;
- **Assess and compare the performance of specific media and geographies** in terms of conversion rates and visitation;
- **Compare the profiles of advertising responders** to those who actually visited Montana as a key to future targeting efforts;
- **Identify visitors' trip specifics**, to include mode of transportation, duration of stay, travel party size and composition, month of travel, lodging type, and activities;
- **Gauge satisfaction** with the Montana trip experience and identify any barriers to satisfaction;
- **Among non-visitors, identify other destinations visited** and their reasons for these choices;
- **Explore the travel decision-making process** relative to timing, use of literature, and advertising influence;
- **Among snowmobilers, gather specific information** about whether they rented or brought their own snowmobiles, specific areas of visitation, and reactions to regulation changes in Yellowstone National Park as they relate to snowmobiles;
- **Among skiers/snowboarders, identify specific Montana ski areas visited**;
- **Create a psychographic/lifestyle profile of Winter visitors** and explore any differences between snowmobilers and skier/snowboarders;
- **Provide conclusions and recommendations** regarding the campaign's effectiveness and implications for future winter marketing efforts on behalf of Montana.

METHODOLOGY

Conversion research starts with a database of leads generated as part of the marketing effort. Strategic Marketing & Research, Inc. (SMARI) has found that the best methodology for collecting conversion data is a blended effort which employs telephone and Internet-based research. For this study, these methodologies were combined. Those leads that included an e-mail address were contacted via the Internet and asked to participate in the study. This effort was augmented by a telephone survey to ensure a representative sample of respondents.

Questionnaires were developed for both the Ski/Snowboard and Snowmobile efforts. While the questionnaires were similar, specific questions were asked relative to each activity. The telephone and Internet versions of each questionnaire were identical, copies of which appear in the Appendix to this report.

Data collection was conducted during June and July 2004, with additional Internet respondents contacted in September. The telephone interviews were conducted from SMARI's telephone center by professional interviewers. The on-line portion of the survey was housed on SMARI's Web interviewing server. For the Ski/Snowboarding campaign, 601 surveys were completed. The Ski/Snowboard effort included four (4) distinct media types (pay per inquiry television, magazines, direct mail and Internet). The survey data were weighted to be representative of the distribution of leads, among these four types. For the Snowmobile conversion research, 772 surveys were completed.

Upon completion of the data collection process, the telephone and on-line data for each survey were combined and a dataset of respondents created. All responses were checked for completeness and accuracy, and this dataset was used in the analysis. In addition, to provide a psychographic profile of visitors, the PRIZM NE system was used to attach segment designations to responses where address data were available.

The following report summarizes the key findings from the research and includes strategic conclusions and recommendations. Since both efforts were elements of the overall Winter Campaign, the results are presented together and comparisons are made between the Ski/Snowboard and Snowmobile Campaigns. The summary reviews lead generation, profiles leads and visitors, explores the trip planning process and Montana's image among potential visitors, assesses the conversion rate, forwards reasons for non-visitation, and reviews the trip specifics and overall economic impact of the campaign.

WINTER CAMPAIGN – LEADS & COSTS

In initially reviewing the effectiveness of these two marketing efforts, we assess the number of leads generated. Leads represent the initial and most immediate measure of a campaign's success. In addition, these leads provide the basis for determining the total number of trips generated and the economic impact of the campaign. The Ski/Snowboard effort generated almost 19,000 leads, while the Snowmobile effort generated nearly 13,000, for a total of 31,850 leads. While these lead numbers are similar, the Ski/Snowboard marketing was much more costly. Consequently, the cost per lead (CPL) for this effort was \$18, while the CPL for the Snowmobile advertising was just \$11. When the Winter marketing effort in its entirety is reviewed, the CPL is \$15.00

Summary of Leads & Costs

	Leads	Cost	CPL
Ski/Snowboard Campaign			
Direct Mail	7,210	\$14,000	\$1.94
Magazines	5,874	\$158,739	\$27.02
Television	2,284	\$43,277*	\$18.95
Web (Internet)	3,643	\$120,940	\$33.19
Subtotal	19,011	\$336,956	\$17.72
Snowmobile Campaign			
Internet	12,839	\$140,933	\$10.98
Total	31,850	\$477,889	\$15.00

In reviewing the results of the various elements of the campaign, some significant variations in the CPL are noted.

- The **direct mail effort** generated a high number of leads for a low cost, thus producing the best CPL.
- The **magazine advertising**, while generating many leads, was the most expensive, so its CPL is almost the highest.
- **Television** generated fairly few leads but, as a mass media vehicle, it can support other types of advertising and help drive leads to other sources.
- The **Internet** results varied between the two campaigns. For the Ski Campaign, Internet was fairly expensive and failed to generate a large number of leads and the CPL was high. For the Snowmobile Campaign, lead generation from the Internet was significantly higher and the CPL was better than for most of the other media options, excepting direct mail. Note also that with Web efforts, it is sometimes hard to track response, as people will visit Websites to gather information, but they will not sign up or appear as leads. As such, the response rates for this effort may be understated.

The last conversion research for Montana wherein the CPL was explored was conducted in 1998 among magazine responders. Then, the overall CPL was \$7.45. However, in 1998, the Internet, as a travel information source, was not as prevalent as it is today. With the ongoing popularity of the Internet, it has become more difficult to track campaign effectiveness since people can go directly to the Website without having to request information. Additionally, the 1998 effort measured response to the Summer advertising campaign. In this light, the current CPL of \$15.00 seems reasonable.

INQUIRER & VISITOR PROFILE

This research was designed to, among other things, develop profiles of inquirers and visitors - - geographically, demographically, and psychographically. This information can help to identify current responders to marketing efforts and actual visitors. Furthermore, it lends support to future targeting efforts.

The geographic information, while interesting, requires interpretation. One challenge of reviewing the geography of responders and visitors is that sometimes seemingly strong responses are merely the result of areas which host large populations. Therefore, in reviewing this information, it helps to compare the profile to the population. If the area represents a good target, the response and visitation rates will be proportionally larger than the population. An index is used to show the response rate to this campaign versus the population in that area. An index of 100 shows that the response is what would be expected based on population, while an index of 150 would indicate that the response was 50% greater than explained by population. A review of the leads from the Ski/Snowboarding program illustrates this issue.

The following table shows the percentage of leads from each state, and an index compared to the population of that state. (An index compares the two percentages - an index of 100 means that the two are the same. A score above 100 shows a higher percentage versus the population.) The state of Washington generated 7.7% of the leads, which is far above its percentage of the population. However, while California generated 7.1% of the leads, given the percentage of population of the state, this is actually less than should be expected.

(See following page)

The best targets are the states that generated a high percentage of leads and index above the population. In evaluating targets, one must be mindful of population, as states with larger populations provide better opportunity for added visitation. Some of the best targets seem to be Idaho, Utah, Washington, Colorado, Oregon, Minnesota, Wisconsin and Maryland.

Profile of Leads – Ski/Snowboard Campaign

States	Ski Leads	Ski Index	States	Ski Leads	Ski Index
Idaho	2.4%	535	Virginia	2.2%	87
North Dakota	1.0%	432	Maine	0.4%	85
Utah	2.6%	379	Indiana	1.8%	83
Washington	7.7%	349	Mississippi	0.8%	82
Wyoming	0.6%	336	Illinois	3.4%	79
Colorado	5.1%	310	Ohio	3.2%	79
Oregon	3.8%	299	Nevada	0.6%	79
Vermont	0.6%	267	Louisiana	1.2%	78
Minnesota	3.8%	216	Pennsylvania	3.4%	77
Wisconsin	3.6%	188	Texas	5.1%	70
Maryland	3.2%	171	Oklahoma	0.8%	64
Tennessee	2.6%	125	New York	4.2%	63
Arkansas	1.2%	124	California	7.1%	63
Missouri	2.4%	118	Kansas	0.6%	63
Michigan	4.0%	114	Florida	3.6%	60
Iowa	1.2%	114	Alabama	0.8%	50
South Carolina	1.6%	112	New Hampshire	0.2%	45
Kentucky	1.6%	111	New Jersey	1.0%	34
North Carolina	3.2%	110	Georgia	1.0%	34
Arizona	2.0%	108	Connecticut	0.2%	16
Nebraska	0.6%	97			
Alaska	0.2%	97			
Massachusetts	2.2%	96			
New Mexico	0.6%	96			

While the profile of ad responders is useful, it is critical to review the profile of those who actually visited Montana. When visitors from the Ski Campaign are considered, 13 states represent over 60% of the visitors. Some of the same states look like good targets and the pattern clearly shows that northwestern and certain midwestern states (Minnesota, Wisconsin, Ohio, Iowa) are the best targets for attracting visitation.

Visitors from Ski Campaign	Visitors	Index
Idaho	6.2%	1330
Wyoming	1.4%	743
Washington	15.1%	670
Minnesota	7.5%	415
Utah	2.7%	386
Colorado	5.5%	329
North Dakota	0.7%	287
Oregon	3.4%	261
Nebraska	1.4%	215
Wisconsin	4.1%	208
Michigan	5.5%	151
Ohio	5.5%	130
Iowa	1.4%	126

The profile of Snowmobile respondents indicates that some of the same states are good targets. In fact, the response was very strong from several states. This includes North Dakota, Idaho, Wyoming, South Dakota, Utah, Minnesota, Wisconsin and Washington.

Profile of Leads – Snowmobile Campaign

States	Snowmobile leads	Snow Index	States	Snowmobile leads	Snow Index
North Dakota	3.0%	1284	Ohio	3.6%	87
Idaho	5.4%	1198	Kentucky	1.1%	78
Wyoming	1.9%	1030	Tennessee	1.6%	75
South Dakota	2.0%	745	Indiana	1.6%	72
Utah	3.6%	515	West Virginia	0.4%	63
Minnesota	8.7%	491	New Jersey	1.9%	63
Wisconsin	7.7%	399	New York	4.1%	62
Washington	5.7%	260	Arizona	1.1%	61
Nebraska	1.6%	253	DC	0.1%	60
Colorado	3.6%	219	Illinois	2.6%	59
Alaska	0.4%	206	North Carolina	1.7%	58
Vermont	0.4%	189	Virginia	1.4%	56
Nevada	1.4%	185	Texas	4.0%	55
Kansas	1.7%	177	Alabama	0.9%	53
Maine	0.7%	151	Missouri	1.0%	49
Iowa	1.4%	134	New Mexico	0.3%	45
Michigan	4.0%	113	Arkansas	0.4%	44
Oregon	1.4%	111	Mississippi	0.4%	44
Pennsylvania	4.6%	102	Massachusetts	1.0%	43
Oklahoma	1.3%	101	Georgia	1.1%	39
Delaware	0.3%	100	Maryland	0.7%	38
Connecticut	1.1%	93	Rhode Island	0.1%	38
			Hawaii	0.1%	37
			California	4.0%	36
			Florida	2.0%	33
			New Hampshire	0.1%	32
			South Carolina	0.3%	20
			Louisiana	0.1%	9

When visitation is considered, 14 states generated over three-quarters of all visitors (77.2%). Again, the best visitor generators tend to be the northwestern states, such as Idaho, North Dakota, Wyoming, Utah and Washington. Among the Snowmobile responders, only a few midwest states seem good targets, such as Wisconsin, Iowa and Kansas.

Visitors from Snowmobile Campaign	Visitors	Index
Idaho	14.8%	3258
North Dakota	7.4%	3160
Wyoming	4.7%	2605
Utah	5.4%	775
South Dakota	2.0%	750
Washington	15.4%	702
Minnesota	8.7%	491
Alaska	0.7%	323
Wisconsin	6.0%	313
Colorado	4.7%	288
Nebraska	1.3%	216
Kansas	2.0%	208
Iowa	2.0%	189
Oregon	2.0%	157

The demographic profile of inquirers and visitors reflects interesting differences between the responders to the two campaigns. Responders to the Ski promotion were more upscale, older and better educated. In addition, there were more single responders, although they are older singles – the average being 38 years of age. Those who responded to the Snowmobile marketing were more likely to be families, with children under the age of 18. When visitors are considered, the patterns are similar. For each campaign, the biggest difference between those who *responded* and those who *traveled* tended to be household income, with the average annual household income of visitors being over \$70,000. Of course, the response and visitation will depend upon the characteristics of the targeted population, but these findings suggest that Travel Montana should focus on more upscale households, especially for ski-related promotions.

Demographics	Ski/Snowboarding Inquirers	Ski/Snowboarding Visitors	Snowmobile Inquirers	Snowmobile Visitors
Married	69.5%	69.0%	75.7%	78.9%
Single/never married	19.7%	22.7%	16.5%	15.6%
Divorced/Widowed	10.8%	8.3%	8.8%	5.4%
Children under age 18	29.4%	33.3%	48.1%	50.7%
Household size	2.6	2.6	3.1	3.0
Average # children	.5	.6	1.0	.9
Female	50.7%	48.2%	52.1%	48.0%
Annual income	\$73,468	\$74,606	\$66,140	\$70,714
College/Post -graduate	58.6%	54.3%	45.9%	46.7%
Average age	52 yrs.	50 yrs.	44 yrs.	44 yrs.

Relative to the Ski marketing effort, it is also helpful to explore the differences in responders to the various media options. Usually, different media are more effective with specific demographic targets. Thus, a media mix can reach a broader target and appeal to different segments of potential visitors. This seems true for the Montana Ski promotion, and the profile of responders to the four specific media options reveal significant differences:

- **Direct Mail** responders included many couples and families, although this medium generated the highest percentage of responses from single people. These responders were fairly affluent and educated, and tended to be female.
- **Magazines** responders had the highest average age and were most likely to be female. This group was also the most likely to be married, with a fairly high level of education and household income.
- **Television** responders were younger, the most likely to have children under the age of 18, and claimed the lowest levels of education and income.
- **Internet** responders, on the other hand, were the youngest and claimed the highest income levels. In addition, this group had the smallest household size and was the least likely to have children under 18 years of age.

Given the profile of visitors, the television campaign was least likely to generate response from the targets. Of course, as a mass medium, the television advertising may have supported the print components of the campaign, but it was less effective at reaching potential visitors.

Demographic Profile of Responders - by Media Source

Demographics	Direct Mail	Magazines	Television	Internet
Married	70.1%	73.9%	62.5%	65.4%
Single/never married	22.3%	16.9%	20.8%	7.7%
Divorced/widowed	9.7%	9.2%	16.6%	26.9%
Children under 18	30.5%	25.2%	40%	20.2%
Size of household	2.6	2.6	2.6	2.3
Average # children	.6	.5	.6	.3
Female	50.2%	53.7%	45.8%	42.3%
Annual income	\$74,770	\$75,606	\$63,260	\$92,173
College/Post Graduate	62.8%	61.6%	37.5%	68.6%
Average age	51 yrs.	53 yrs.	49 yrs.	46 yrs.

Another way to profile responders and visitors is to use psychographics. In this case, we used a system called PRIZM NE, which classifies people by a variety of factors and designates classifications by zip code. By using zip codes, it is possible to create a profile of visitors that is linked to a wide array of demographic, geographic, purchase and attitudinal information. This system features 66 segments. In considering the segments, the lower the cluster number ID, the higher its socio-economic rank. Consequently, Cluster 1 is the most upscale and Cluster 66 is the least wealthy. Additionally, each cluster is grouped into one of three lifestyle categories: Younger, no children (designated

with a Y); Families with children at home (designated with an F); Mature with no children or none at home (designated with M).

The profile of skiers indicates that 15 clusters represent over half the Montana visitors, although these 15 clusters represent only 30% of the population. The profile of skiers is generally upscale and includes a high percentage of mature couples and empty nesters. In fact, only 5% of these clusters are younger, with no children. In addition, these visitors tend to come from small town and rural areas – not surprising given that many come from western and midwestern states. (Details of these clusters appear in the Appendix)

Among the Skiers, five (5) clusters fall into the Family Segment. These are families that have chosen to move from the big cities and suburbs and relocate to small town areas. They are fairly affluent and thrive on outdoor and sporting activities.

As noted, the largest group among these targets is concentrated in the Mature Segment, which includes eight (8) clusters. These tend to be similar to the Family segments, except that they are now empty nesters. They are the active mature market and have the money to travel and enjoy sports and outdoor activities.

The last two clusters among this target audience include couples and singles without children. These two clusters tend to be middle-aged couples who are quite affluent. Again, however, they have chosen to live in small towns and rural areas. They have lots of disposable income, high paying jobs and enjoy travel and a variety of activities.

PRIZM Profile of Ski Visitors

PRIZM NE Cluster	PRIZM	% Of Skiers	Index*	Segment
Blue Blood Estates	2	3.8%	567	F
Country Squires	5	4.8%	93	F
Fast-Track Families	20	2.7%	321	F
New Homesteaders	32	2.1%	117	F
Big Sky Families	33	2.5%	667	F
Upper Crust	1	4.6%	170	M
Money & Brains	7	2.3%	125	M
Big Fish, Small Pond	9	5.7%	179	M
Pools & Patios	15	3.6%	136	M
Middleburg Managers	27	4.8%	175	M
Traditional Times	28	4.2%	133	M
Simple Pleasures	38	2.5%	179	M
City Roots	61	2.5%	443	M
Brite Lites, Li'l City	12	2.1%	101	Y
Country Casuals	25	2.9%	242	Y
		51.3%	168	

For Snowmobile visitors, 17 clusters represent just over one-half the total and only about 25% of the population. As with the demographic profile, the psychographic profile of the Snowmobile visitors is somewhat different. It is less upscale, more family-oriented and even more concentrated among small towns and rural areas. While several of the top socio-economic clusters visited Montana after responding to the Ski Campaign, this is not

the case for the Snowmobile effort. These visitors tended to be concentrated in the middle clusters, and those who probably live in places similar to Montana.

Among the Snowmobile responders, eight (8) of the target clusters fall into the Family Segment. While some of these are the same as noted in the Ski target, the clusters in this target are not as upscale. They are more traditional families, and their lifestyles tend to be child-focused. There is a mix of professionals and blue-collar workers. They do acquire lots of sporting equipment and enjoy a variety of outdoor activities.

Another six (6) clusters fall into the Mature Segment, with a concentration in small town and rural areas. These couples are quite traditional and unpretentious. Members of these clusters tend to be older, with many nearing or enjoying retirement. They are still active and enjoy hunting, boating, and camping.

The final three (3) clusters fall into the Younger Segment, and Brite Lites, Li'l City was also a target for the Ski market. The other clusters like the rustic lifestyle and tend to be blue-collar singles and younger families.

PRIZM Profile of Snowmobile Visitors

PRIZM NE Cluster	PRIZM	% Of Snowmobile	Index*	Segment
Upward Bound	13	2.4%	428	F
Kids & Cul-de-Sacs	18	2.1%	364	F
Fast-Track Families	20	4.5%	526	F
Country Casuals	25	3.6%	294	F
New Homesteaders	32	3.7%	207	F
Big Sky Families	33	3.7%	986	F
White Picket Fences	34	2.4%	348	F
Shotguns & Pickups	51	2.8%	1571	F
Big Fish, Small Pond	9	3.0%	94	M
Traditional Times	28	4.0%	128	M
Simple Pleasures	38	2.7%	191	M
Heartlanders	43	2.4%	216	M
Back Country Folks	58	2.4%	1273	M
City Roots	61	2.7%	471	M
Brite Lites, Li'l City	12	2.2%	107	Y
Mayberry-ville	37	3.9%	309	Y
Young & Rustic	48	2.2%	197	Y
		50.7%		

The profiling information indicates some specific targets that will generate the best results for Montana. First, the best geographic targets are northwestern and selected midwestern states. A few of the midwestern states – Minnesota, Wisconsin and Michigan seem especially good targets, and have large enough population bases to provide good opportunities to generate additional visitation. While several other states generate leads and visitors, they do not perform well compared to what might be expected given their populations.

For the Ski market, the best targets are upscale, mature couples, empty nesters and single people. Given that some of the highest socio-economic PRIZM clusters are included in the target, these are sophisticated, educated visitors, as illustrated by some of the cluster names – Blue Blood Estates, Upper Crust and Country Squires. This finding suggests that they will also be valuable in terms of their expenditures in the State. Finally, the best targets are more likely to be located in smaller towns and rural areas as opposed to large urban areas.

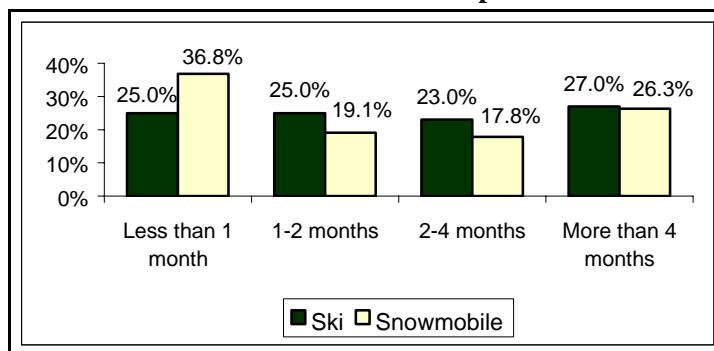
For the Snowmobile market, the best targets are more middle-of-the-road families. Again, these families are more likely to live in small towns and rural areas. The cluster names like Heartlanders, Simple Pleasures, Mayberry-ville and White Picket Fences characterize this target. They will respond to family-oriented messages and are probably *not looking* for a sophisticated or luxury experience.

TRIP PLANNING & IMPACT OF INFORMATION

In addition to measuring conversion among advertising responders, the research explored the travel planning process and the impact of the information that Travel Montana provided. Ideally, the information helps “close the sale” and convinces consumers to visit and spend more time and money in the State.

In developing campaigns to generate visitation, it is important to know when people plan their trips. With this information, Montana can pinpoint the best time to launch its advertising campaign. National information indicates that the travel planning timeframe has been shrinking, and that people generally tend to decide on a travel destination closer to the actual time of the trip, with over 60% making plans within two months of actually traveling. For visitors’ trips to Montana, which tend to be longer, visitors indicated that many of their trips were planned at least two months in advance.

How Far in Advance was Trip Planned?



It is interesting to review the type of advertising recalled by those who requested information. Myriad advertising and information sources were mentioned, suggesting that many consumers were exposed to multiple advertising media before responding. Apparently, synergy within the campaign helped drive the response rates.

Those from the Ski Campaign were most likely to recall magazine ads and articles and TV ads. Ad recall among the Snowmobile responders was weaker, with Internet and magazine ads being the sources cited most often.

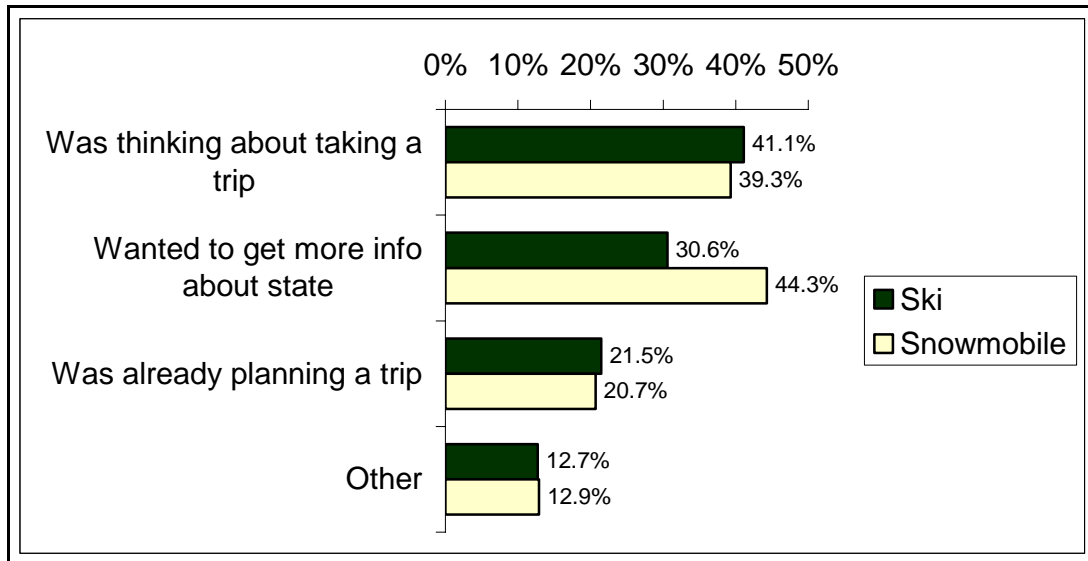
Promoters of tourism must determine how much influence their materials have on consumers’ travel decision-making. This can be difficult because people do not like to admit being influenced by advertising – a fact highlighted in the survey and some of the answers provided by respondents.

Advertising or Promotions for Montana Seen Prior to Requesting Information

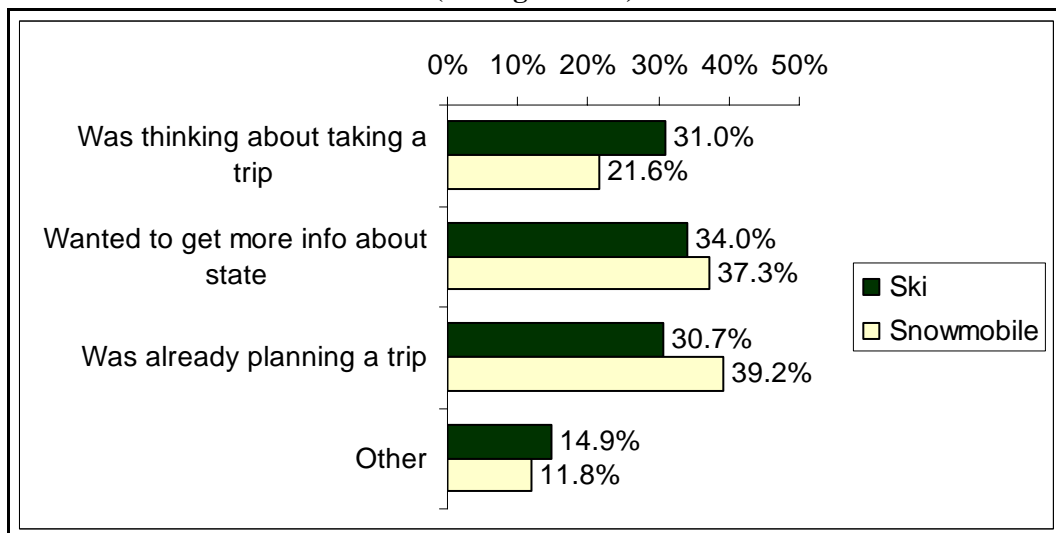
Media	Ski	Snowmobile
Magazine ads	44.8%	13.0%
Magazine articles	13.3%	6.2%
Television	11.3%	5.8%
Internet ads	9.7%	14.0%
Other	7.7%	3.2%
Search engine link	4.4%	3.9%
Newspaper articles	4.0%	1.6%
Mailing	3.6%	3.6%
Link on another site	1.6%	5.5%
Newspaper ads	0.0%	1.3%
Radio ads	0.0%	1.0%

When asked what prompted them to request information from the State, most people indicated that they wanted information, or that they were thinking about taking a trip. Only about 20% indicated that they were already planning a trip to Montana. Even among visitors, only 30.7% for Ski and 39.2% for Snowmobile indicated that they were already planning a trip.

**Reasons for Requesting Information
(among all inquirers)**

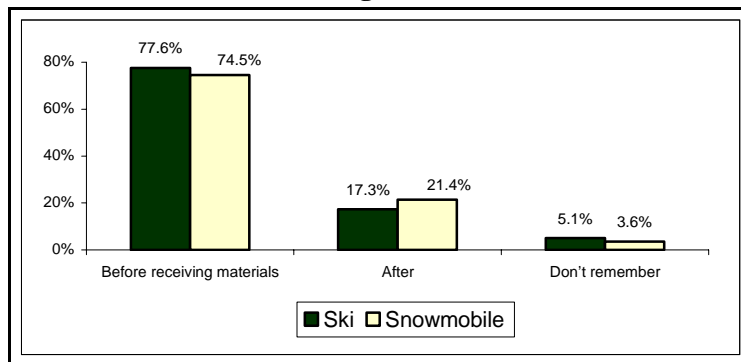


**Reasons for Requesting Information
(among visitors)**



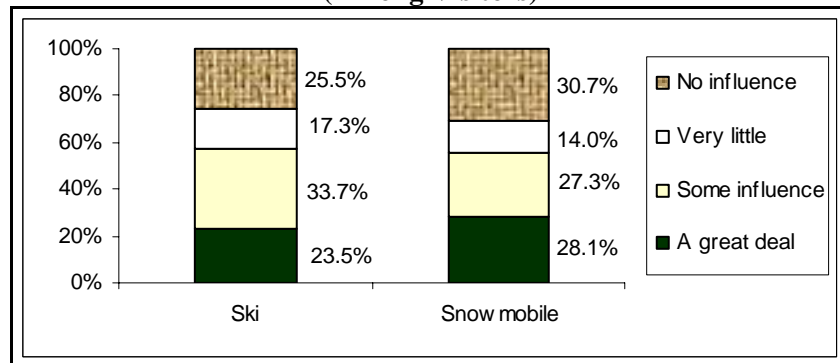
Yet, when the visitors were asked whether they decided to travel to Montana before or after they requested information, over three-quarters indicated that they had already made the decision. Given that about one-half this amount indicated that they were already planning a trip, it is likely that the impact of the information was actually higher. People were probably thinking about a trip and were interested in Montana. Still, it is likely that the materials helped to “close the sale” and reinforce or finalize the decision.

**Timing of Decision to Visit Montana
(Among Visitors)**



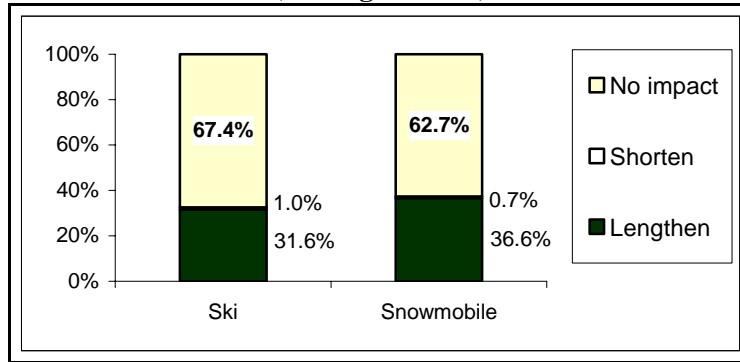
In addition, about one-half of the visitors who recalled receiving information from Montana indicated that it had either a “great deal” or “some” influence on their decision. This again reinforces the finding that the materials are useful in actually converting interested visitors into actual visitors.

**Influence of Materials
(Among Visitors)**



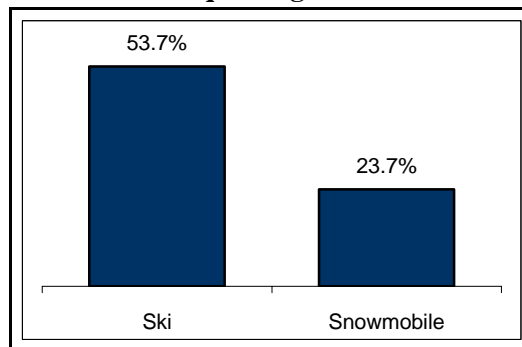
Finally, the materials can have a positive influence in convincing people to spend more time in the State. Longer trips result in higher trip expenditures, which equates to more valuable visitors. Therefore, it is positive that about one-third of the respondents indicated that the materials influenced them to stay longer in Montana.

**Impact on Duration of Trip
(Among Visitors)**



These findings suggest that when people recall requesting information from Montana and when they used the materials, the material has an impact on the decision-making process. Most people are already interested in visiting Montana when they request information. Consequently, the information does not necessarily prompt the decision to visit. However, the information can reinforce their level of interest and actually “convert” potential visitors. In addition, the information also helps increase trip duration, which in turn will result in greater economic impact on the State. For the Winter Campaign, the impact was greatest among responders to the Ski/Snowboarding campaign, as about twice as many recalled requesting information. This may be a result of how the campaigns were designed, with the Snowmobile campaign utilizing the Web. Many of these respondents may have gone on-line for information, or responded to the promotion and not considered it “requesting information.”

Recall Requesting Information



MONTANA'S IMAGE

The marketing efforts are designed to generate interest in Montana and encourage people to visit, especially during the winter season. However, consumers have an established image of the State and identifying this image can help when assessing the impact of the campaign, and whether its message is appropriate.

To explore the State's existing imagery, the respondents were asked to consider 22 descriptions of the State and to rate how much they *agreed* that each one described Montana. Respondents used a 5-point scale, where the higher the rating given the more the respondent agreed that the statement described Montana. With this scale, a rating of 4.5 or higher indicates *strong agreement*. A rating between 4 and 4.5 indicates agreement.

Among those who responded to the Ski Campaign, the descriptions they chose for Montana included natural beauty and scenery, openness, wildlife, mountains and calm and relaxing. The State seems to be known for its outdoor activities, a sense of adventure and western hospitality. Interestingly, they did not seem to make a strong correlation between Montana and either downhill or cross-country skiing. This finding suggests that the marketing will have to change the existing image, which may take time. Montana also did not get high ratings as a place to visit Lewis and Clark sites or historic sites.

Image of Montana among Ski Responders

Image Attributes	Ski
Natural beauty/scenery	4.72
Openness/open space	4.67
Wildlife	4.56
Mountains	4.53
Calm/relaxing/less traffic	4.50
Rivers and lakes	4.46
Visit national parks	4.40
Photography	4.37
Sense of adventure	4.30
Hiking or walking	4.25
Western hospitality	4.19
Recreational pursuits/general	4.18
Fishing	4.17
Camping/RV-ing	4.14
Winter sports in general	3.97
Hunting	3.94
Downhill skiing or snowboarding	3.79
Snowmobiling	3.76
Visit Lewis & Clark sites	3.63
Visit historical sites	3.53
Cross country skiing	3.46
Family and friends	3.00

The results are similar from Snowmobile Campaign respondents. The same descriptions earned the highest ratings – openness, natural beauty, wildlife, mountains and calm and relaxing. While these respondents were generated through a campaign aimed at bringing snowmobilers to the State, they do not give Montana strong ratings for being a place for this activity or for winter sports in general.

Image of Montana among Snowmobile Responders

Image Attributes	Snowmobile
Openness/open space	4.54
Natural beauty/scenery	4.43
Wildlife	4.43
Mountains	4.37
Calm/relaxing/less traffic	4.29
Visit national parks	4.20
Rivers & lakes	4.18
Hiking or walking	4.16
Photography	4.15
Hunting	4.12
Camping/RV-ing	4.09
Sense of adventure	4.08
Fishing	4.07
Western hospitality	3.95
Snowmobiling	3.89
Recreational pursuits/general	3.87
Winter sports in general	3.85
Visit Lewis & Clark sites	3.57
Downhill skiing or snowboarding	3.40
Cross country skiing	3.36
Visit historical sites	3.29
Family & Friends	2.79

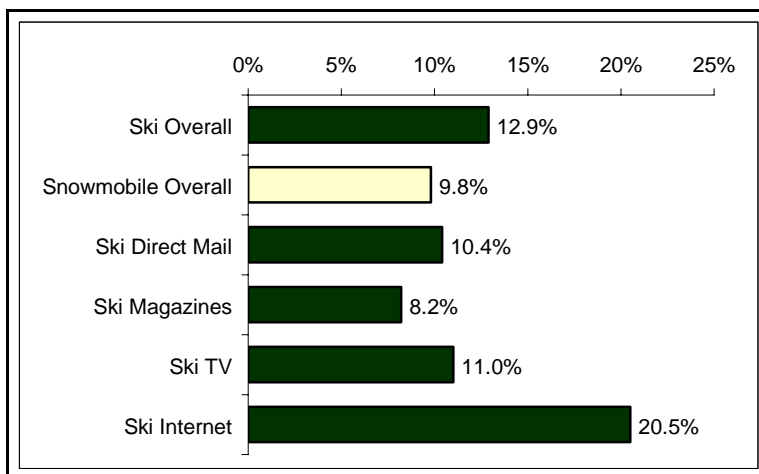
Montana's current image fits with the Big Sky message that has been used over the past several years. Potential visitors see the State as a place that has beautiful scenery, open spaces, relaxation and natural features. They are not as likely to associate Montana with specific winter sports, recreational pursuits or historic sites.

CONVERSION

State advertising efforts usually have a number of goals and are designed to promote the image of the destination, generate requests for information and attract additional visitation. When people who request information subsequently travel to the State they are considered “converted.” Of course, one challenge of measuring the impact of the advertising and its ability to convert visitors is timing. In many cases, it takes several months or even years before the initial interest generated by advertising translates into visitation. This is certainly true for advertising to Montana since, for many, a trip to the State is a major undertaking that involves a great deal of planning. Therefore, it is useful to consider the short-term conversion that has already occurred and to consider additional travel that is likely to be generated by future efforts.

This conversion research measures the impact of the Winter Advertising effort for Travel Montana. This campaign ran during the later part of 2003 and the early part of 2004. As such, the time lapse from the campaign has been only a few months, which is a fairly short time. Hence, it is likely that while some conversion has resulted, additional travel will be generated through these efforts. In fact, the conversion rates for the Ski and Snowmobile Campaign are fairly low, compared to past conversion measures for warm season campaigns.

Conversion



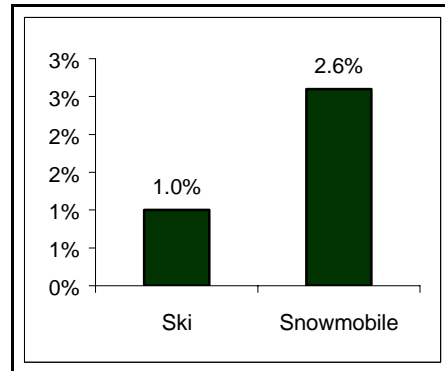
By taking the total number of leads generated by the campaign and the conversion rate, it is possible to determine that over 3,700 visits to the State were taken by responders to the Winter Campaign.

Trips Generated

Visitors	# Of Leads	Conversion Rate	# Of Trips Generated
Ski/Snowboard	19,011	12.9%	2,463
Snowmobile	12,839	9.8%	1,258
Total	31,850	11.7%	3,721

It is also interesting to consider whether the campaigns brought new visitors to the State. As such, the respondents were asked whether they had visited Montana within the past five years. About one-half of those who responded to the Ski Campaign, and 40% of those who responded to the Snowmobile Campaign had visited Montana in the past five years. Among visitors to the State, 98% had been to Montana within this timeframe, and the percentage of first-time visitors was very small. This indicates that the campaign is generally “reminding” past visitors that Montana has lots to offer and would be a good place to visit again

First-time Visitors

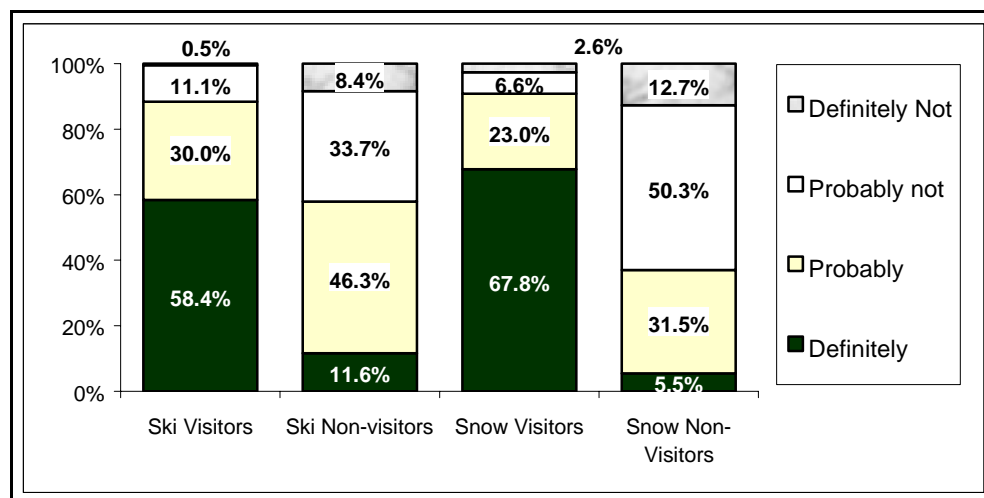


Past Visitation to Montana

Visitors	% Visited in Past 5 Years	Average # of Visits
Ski/Snowboard	99%	3.4
Snowmobile	97%	6.4

These advertising efforts will continue to contribute to additional visitation to Montana in two ways. First, some of the people who have not converted will take a trip to Montana at a later date. In addition, many of those who have already visited will return. To explore these additional impacts, both visitors and non-visitors were asked about their likelihood to visit Montana within the next two years. On a positive note, the respondents expressed a strong likelihood to return within that timeframe, and there was significant interest among non-visitors.

Likelihood to Visit Montana in Next Two Years



Of course, not everyone will follow through on these intentions. Companies who use this type of research to predict sales often use the 80/20 rule. They assume that 80% of those that say they will definitely purchase, and 20% of those who say they will probably purchase will actually do so. This same type of calculation can help determine how much additional conversion Travel Montana might expect from this campaign. These calculations suggest that almost one-third of the responders to the Ski/Snowboarding campaign will eventually visit or re-visit the State and, about one-quarter of the Snowmobile responders will visit.

Projected Conversion*

	Conversion to Date	Projected Additional Conversion	Projected Repeat Visitation	Total Projected Conversion
Ski/Snowboard Campaign	12.9%	16.8%	5.3%	35.0%
Snowmobile Campaign	9.8%	9.7%	5.8%	25.3%

At the same time, only part of this travel would come during the winter season. Summer is the most popular season, although many of these respondents are interested in visiting during the winter months. Those who have already visited and converted from this campaign are the most likely to say they will return in the winter.

Season of Visitation

Season	Ski Visitors	Ski Non-visitors	Snowmobile Visitors	Snowmobile Non-visitors
Winter	33.8%	22.3%	29.7%	11.5%
Spring	11.9%	13.8%	12.3%	14.4%
Summer	40.6%	41.3%	42.0%	56.9%
Fall	13.7%	22.6%	15.9%	17.2%

Given that many of the people who responded to this campaign came from great distances, it may take time for them to finalize plans and actually travel to Montana. Therefore, it makes sense that the level of conversion to date represents only part of the total impact of the campaign. By considering additional probable travel, these calculations provide insight into the projected overall impact of the campaign.

Of course, one reason that people do not travel to Montana is that they choose other options. Therefore, it is useful to explore the attitudes and behaviors of non-visitors.

NON-VISITORS

Given the fact that only about 11% of the responders indicated recently visiting Montana, the majority falls into the “non-visitor” category. As noted, many of these will become visitors over time. Still, it is useful to know more of their behavior and consider ways to increase conversion in the future.

Predictably, the primary reason that people indicated not traveling to Montana was that they chose another location. Snowmobile respondents were more likely to give this reason, while over 40% were more likely to say that they preferred a location closer to home or that they did not receive the information. Just 3.9% of respondents indicated not visiting Montana because of changes in the snowmobile regulations.

Responders to the Ski Campaign were a bit more likely to say that they had no time for a trip or that there were personal reasons for not traveling. At the same time, almost one-third of these responders - 30.5% - indicated choosing another location over Montana.

Reasons for Not Visiting		
Reasons for Non-visitation	Ski	Snow
Visited another location	30.5%	41.7%
No time for a trip	18.4%	16.4%
Prefer location closer to home	8.3%	12.4%
Could not afford trip/financial	6.1%	10.6%
Montana not attractive	7.4%	9.0%
Did not receive information	0.3%	4.4%
Personal/family	5.3%	4.1%
No reason	5.2%	4.0%
Changes in regulations	NA	3.9%
Cost of air travel too expensive	2.3%	3.5%
Already been	2.8%	1.4%

As might be expected, non-visitors mentioned visiting a wide variety of different places. Interestingly, it seems that in many cases they did not visit competitive places to partake in winter activities. Instead, they chose places like Florida, Mexico and the Caribbean. Two other popular destinations were mentioned - New York and California, which could have included some winter activities.

Visited Instead of Montana

Place Visited	Ski	Snow
Florida	15.4%	14.5%
New York	5.3%	11.3%
California	8.5%	10.8%
Canada	3.9%	5.1%
Texas	4.3%	4.8%
Caribbean	7.0%	4.6%
Mexico	5.1%	3.5%
Colorado	3.9%	3.0%
New Mexico	3.4%	1.8%
Nowhere	1.6%	0.5%

Respondents to the snowmobile campaign were asked to indicate other states or provinces where they have taken snowmobiling trips. Many indicated not taking this type of trip but, among those that had, the following states were mentioned:

Past Snowmobile Trips

Wyoming	6.6%
Idaho	6.0%
Michigan	3.2%
Wisconsin	2.6%
Canada	2.4%
Colorado	2.1%

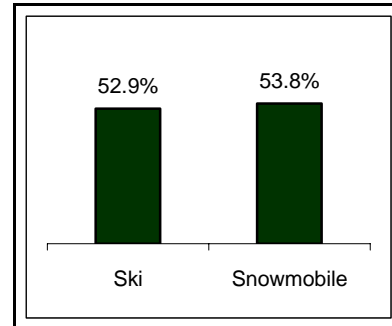
Generally, these findings suggest that the challenge of the Winter Campaign will be to convince people to choose to celebrate winter activities rather than to escape to a warmer climate. Also, given the trip planning information, Montana may need to begin advertising winter activities at an earlier date – before consumers make decisions to visit elsewhere. This finding coupled with the geographic information about visitors probably reinforces the viability of targeting states where people are perhaps more active in the outdoors and choose to live with the cold. While other states offer some potential, the competitive set is more difficult, and generating the desired type of trip will take longer.

TRIP SPECIFICS

This research was designed to measure the impact of Travel Montana's marketing efforts and to learn more about winter visitors, or at least those people who responded to the Winter Campaign.

Overall research shows that about 32% of the trips to Montana are "pass through" trips, but about half the visitors from this study indicated that Montana was not their primary vacation destination. The respondents to the Snowmobile Campaign were asked about other places they visited during their Montana trip. Wyoming (55.8%) and Idaho (40.4%) were the most popular. Other states that they reported visiting included South Dakota (10.6%), Canada (8.7%), Washington (9.6%) and Colorado (4.8%). (This question was not asked of respondents to the Ski Campaign).

**Montana Was
Primary Destination**



One of the more interesting findings from this research is that many of the responders that visited Montana indicated visiting the State prior to September 2003. Since they indicated that they had visited within the past year, they probably came during the summer months of 2003.

The most popular month for visitation was May, with more than one in five from both the Ski and Snowmobile Campaigns reporting a visit during this month. The rest of the visitation was spread over the various fall, winter and spring months.

Month of Visitation

Month	Ski	Snowmobile
Prior to Sept 2003	32.5%	30.4%
September	7.2%	7.0%
October	2.2%	4.1%
November	4.3%	4.1%
December	2.7%	2.3%
January	7.3%	4.1%
February	3.0%	7.0%
March	10.2%	9.9%
April	7.4%	8.2%
May	23.2%	22.8%

One reason that more visitation did not occur during the winter months was that the winter sporting activities of skiing and snowmobiling are not necessarily the primary activities driving visitation. In fact, only 16.7% of the respondents to the Ski Campaign actually skied while in the State, and 24.0% of those who responded to the Snowmobile Campaign actually went snowmobiling. Sightseeing, outdoor activities and visiting historic sites were the most popular pastimes.

Activities during Montana Trips

Activities	Ski	Snowmobile
Downhill skiing	16.7%	7.6%
Snowboarding	2.7%	4.1%
Cross Country skiing	3.1%	2.3%
Snowmobiling	6.1%	24.0%
Sightseeing	61.7%	58.5%
Visiting historic sites	37.5%	36.3%
Outdoor activities (e.g., hiking or camping)	39.5%	33.3%
Hunting	7.3%	4.1%

A number of reasons were cited as the primary purpose of trips to Montana. Recreation activities were the most popular, but visiting family and friends, sightseeing and relaxation and escape were important as well. Note that while the majority of visitors indicated sightseeing during their visit to Montana, few indicated that sightseeing was the primary reason for their visit.

Primary Purpose of Trip to Montana

Purpose of Trip	Ski	Snowmobile
Recreation and activities	38.8%	31.6%
Sightseeing	15.6%	8.8%
Visit family/Family affairs	13.2%	16.4%
Relaxation and escape	10.8%	7.0%
Business, conferences, convention	7.2%	10.5%
Just passing through	4.8%	15.8%
Visit friends	3.5%	2.9%
Reunion	2.1%	1.2%
Combination business/pleasure	1.8%	1.8%
Wedding	0.5%	2.3%
Medical reasons	0.4%	0.0%
Visit historical sites/History museum	0.4%	0.6%
Don't remember	0.4%	0.6%

Most visitors traveled to Montana via car, but almost one-third of skiers traveled by air. Very few traveled by bus or train. This finding fits with the geographic information which indicated that visitors are more likely to be from relatively nearby western and northern midwestern states.

Mode of Transport	Ski	Snowmobile
Car, van or RV	59.7%	78.4%
Plane	31.7%	17.5%
Bus	3.0%	1.8%
Train	2.2%	1.2%
Other	3.4%	1.2%

The average duration of a trip was 5.3 days among responders to the Ski Campaign and considerably shorter for those from the Snowmobile effort. For those who responded to the Ski Campaign, the average party size was 2.8 people, and only 27.1% traveled with children.

Trip Duration & Party Composition

	Ski	Snowmobile
Average duration of trip	5.3 days	3.8 days
Average number of adults	2.8	3.7
Average number of children (under 18)	.8	.7
% Traveling w/ children	27.1%	30.1%

Travel Party Composition

Travel Party	Ski	Snowmobile
Family	37.6%	49.7%
Couple	22.1%	14.4%
Friends	15.2%	15.0%
Family & friends	8.0%	13.1%
Alone	10.0%	0.7%
Business association	4.4%	4.6%
Organized group/club	2.3%	2.6%

Given the duration of stay and the fact that few people only spent a day in Montana, it is not surprising that many used some type of paid accommodations. Hotel/motel properties were the most prevalent, and many people camped. Among those from the Ski Campaign, 15.4% stayed with family or friends or in their vacation or second home.

Type of Accommodations Used

Accommodations	Ski	Snowmobile
Hotel or motel	38.7%	50.0%
Home of friends or relatives	15.4%	15.5%
Campground	10.5%	6.1%
RV Park	10.6%	8.8%
Rental condo or home	5.7%	6.8%
Resort	4.9%	3.4%
Bed & Breakfast	3.8%	1.4%
Own vacation or second home	2.1%	2.0%
Guest ranch	0.5%	3.4%

The survey also gathered specific information on where visitors pursued skiing and snowmobiling activities. Given that many visitors from these efforts did not actually participate in these sports, the sample size for these questions was fairly small. Therefore, the findings should be considered directional as opposed to actual. In other words, the sites that have higher percentages were likely to be more popular with visitors, but the actual percentage of visitation received by each may not be exact.

Among the downhill skiers, over 70% only one site to ski.. The two favorite places for downhill skiing were the Big Mountain and Big Sky resorts. Several other sites were mentioned by some visitors, although several of the sites received no visitation.

Sites Visited for Downhill Skiing

Sites Visited	%*
Big Sky Resort	52.3%
Big Mountain Resort	29.6%
Bridger Bowl	9.0%
Moonlight Basin	8.4%
Red Lodge Mountain Resort	6.9%
Snowbowl	6.6%
Blacktail Mountain	4.5%
Bear paw ski bowl	2.4%
Discovery Basin	2.1%
Lost Trail Powder Mountain	2.1%
Other*	2.1%
*n = 42 people	

For cross-country skiing, only twelve (12) people indicated participating in this activity. In addition, nearly half indicated that they did not visit a specific cross-country site. The Bigfork Nordic Center was the only specific site mentioned by several visitors.

Sites Visited for Cross Country Skiing

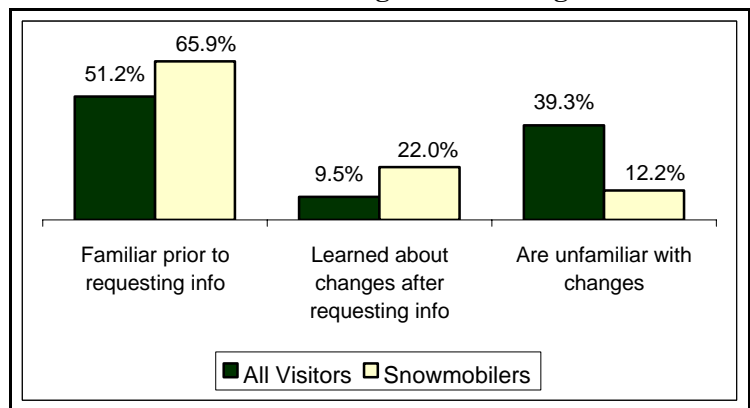
Bigfork Nordic Center	22.5%
Big Mountain Nordic Center	8.6%
Gallatin National Forest	7.5%
Lone Mountain Ranch	7.5%
Yellowstone National Park	7.5%
Other*	46.3%
n=12 people	

When asked where they went to snowmobile, 78% of those who participated in this activity reported visiting a single site, while 10% went to two places. The remainder (12%) visited multiple sites. The West Yellowstone and Yellowstone National Park area were the most popular destinations by far. The majority of snowmobilers were familiar with the changes in regulations prior to visiting Montana, either before or as a result of requesting information. However, 13.9% indicated being unaware of the changes. Predictably, the snowmobilers were much more familiar with the changes than were visitors in general.

Places visited to snowmobile	%*
West Yellowstone	41.5%
Yellowstone Nat'l. Park	31.7%
Cooke City/Silver Gate	12.2%
Bozeman/Big Sky	12.2%
Lolo Pass	9.8%
Big Timber	7.3%
Virginia City/Ennis	7.3%
Seeley Lake	4.9%
Dillon/Polaris	4.9%
Hamilton/Skalkaho	4.9%
Flathead Valley	4.9%
Kootenai Country	2.4%
Lincoln	2.4%
Deerlodge	2.4%
Haugan	2.4%
Helena	2.4%
Wisdom/Jackson/Sula	2.4%
Wise River	2.4%
Livingston	2.4%
Other	9.8%
Cut Bank	0.0%
Elk Park	0.0%
Garnet	0.0%
Georgetown Lake	0.0%
Kings Hill/Little Belts	0.0%
Mission Mountains	0.0%

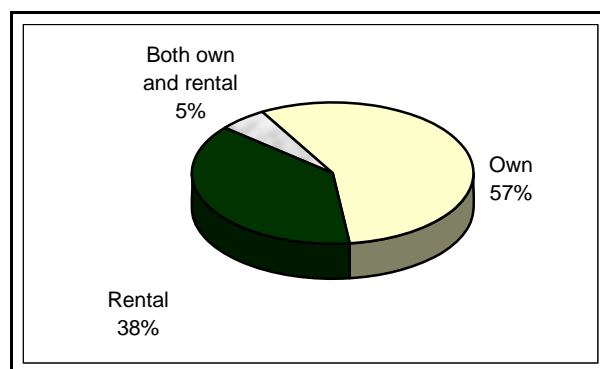
* n = 41 people

Awareness of Regulation Changes



More than half of those who went snowmobiling in Montana brought their own snowmobiles with them, although nearly 40% used only rented snowmobiles.

Snowmobiles Used



In addition to other questions about their visit, respondents were asked about their per-day expenditures. This information can be used to determine the overall economic impact generated by the campaign. Among the Ski responders, the total per-day expenditures were \$487, with the most money spent on meals and lodging, followed by transportation and shopping. For some groups of respondents, transportation costs were considerable, while the respondents from the direct mail and television efforts spent much less. The total trip expenditures for Ski responders averaged \$2,583. However, due to differences in expenditures and trip duration, the overall expenditures from the respondents to different media varied significantly, ranging from a low of \$1,237 for TV leads to a high of \$3,124 for Internet leads.

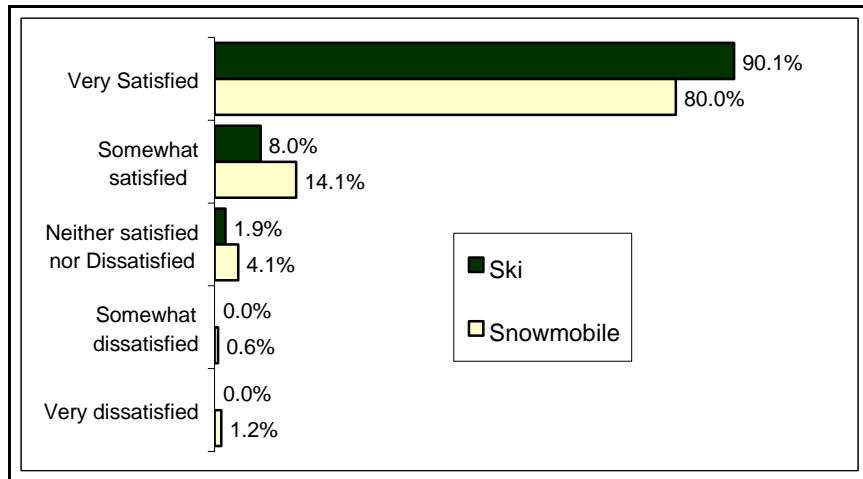
The average expenditures for those who responded to the Snowmobile Campaign were lower overall than the Ski Campaign respondents - \$314 per day and, because their trips were about a day and a half shorter, the overall trip expenditures were only \$1,205. They reported spending less than the visitors generated via the Ski Campaign in every area except *miscellaneous expenses*.

Expenditures – by Campaign and Media

	Direct Mail	Magazines	TV	Internet	Ski Overall	Snowmobile Overall
Lodging	\$131	\$206	\$ 85	\$179	\$150	\$ 70
Meals/food/groceries	\$110	\$120	\$ 32	\$86	\$85	\$ 54
Admission/costs at attractions & Parks, including rentals, lift tickets etc.	\$ 41	\$ 61	\$ 18	\$52	\$40	\$ 38
Entertainment	\$ 63	\$ 56	\$ 10	\$20	\$39	\$ 22
Shopping	\$ 69	\$ 74	\$100	\$40	\$76	\$ 55
Transportation costs in Montana/rental car, gasoline, taxis, shuttles	\$ 88	\$137	\$ 14	\$98	\$78	\$ 52
Miscellaneous Other	\$ 27	\$ 13	\$ 4	\$42	\$18	\$ 24
Total per day expenditures	\$530	\$667	\$263	\$518	\$487	\$ 314
# Days	5.2	4.4	4.7	6.0	5.3	3.8
Total	\$2,756	\$2,936	\$1,237	\$3,124	\$2,583	\$ 1,205

Generally, visitors were quite pleased with the Montana experience, with the majority claiming to be “very satisfied.” This was especially true among those who responded to the Ski Campaign, where 90% expressed the strongest level of satisfaction. This is a positive finding regarding repeat visitation, although the challenge for Travel Montana is how to communicate this level of satisfaction to attract additional visitors and build upon visitors’ positive experiences in the State.

Satisfaction with Montana Trip



ECONOMIC IMPACT

The ultimate goal of the winter marketing campaign is to attract additional visitation to the State and generate extra tourism spending. A review of the number of trips generated through this effort and average trip spending allows for calculation of the economic impact of these efforts and the return on investment from these campaigns. The Ski Campaign generated over 19,000 leads and over \$6 million in economic impact. The number of leads for the Snowmobile Campaign was lower and the conversion rate was similar. However, because visitors from this campaign tended to spend less per trip, the economic impact was much weaker, at approximately \$1.5 million. The total economic impact generated by the Winter Advertising Campaign was \$8.3 million.

Economic Impact Generated by the Campaigns

	Leads	Conversion	Trips	Expenditures	Economic Impact
Direct Mail	7210	10.4%	750	\$2,756	\$2,066,511
Magazines	5874	8.2%	482	\$2,936	\$1,414,292
Television	2284	11.0%	251	\$1,237	\$310,872
Web	3643	26.9%	980	\$3,124	\$3,061,417
	19011	12.9%	2463	\$2,777	\$6,853,092
Snowmobile	12839	9.8%	1258	\$1,205	\$1,515,890
Total	31850	11.7%	3721	\$2,249	\$8,368,982

Next, we compare the economic impact to the sum invested by Travel Montana in its efforts. As noted, the overall campaign generated \$8.3 million and the campaign in its entirety cost \$477,000 - meaning that for every \$1 spent on the Winter marketing efforts, visitors spent \$17.51 in Montana. The ROI for the Ski marketing effort was higher at \$20.34, while the ROI for the Snowmobiling effort was \$10.76.

Return on Investment Generated by the Campaigns

	Economic impact	Cost	ROI
Direct Mail	\$2,066,511	\$14,000	\$147.61
Magazines	\$1,414,292	\$158,739	\$8.91
Television	\$310,872	\$43,277	\$7.18
Web	\$3,061,417	\$120,940	\$25.31
Total	\$6,853,092	\$336,956	\$20.34
Snowmobile	\$1,515,890	\$140,933	\$10.76
Total	\$8,368,982	\$477,889	\$17.51

Travel Montana will want to consider monitoring the additional impact from these campaigns. It would make sense to re-contact some of the respondents in another year to measure the additional travel generated, both in terms of repeat visitation and additional households that have “converted.”

CONCLUSIONS & RECOMMENDATIONS

- The Winter Campaign generated over 3,700 trips to Montana during the past year. These trips generated almost \$8.4 million in additional visitor spending. As a result, for every \$1 spent by Travel Montana on the Winter Campaign, visitors spent \$17.51 in the State.
- A comparison between the Ski and Snowmobile promotions indicates that the Ski promotion generated more leads, a higher conversion rate and a better return on investment.
- Yet, it is also important to note that one reason the Ski Campaign was more valuable to the State was that visitors from this effort spent almost twice as much per trip when they were in Montana.
- Additionally, many people indicated that they will visit Montana in the future, or return to the State. This indicates that over the long-term the economic impact generated from this campaign will increase. It will be important for Travel Montana to consider tracking this additional impact.
- Montana's current image fits with the Big Sky message that has been used over the past several years. Potential visitors see the State as a place with beautiful scenery, open spaces, relaxation and natural features. They are not as likely to associate Montana with specific winter sports, recreational pursuits or historic sites. The lack of a strong image as a place to enjoy skiing and snowmobiling should be addressed in the advertising and marketing efforts.
- Generally these findings suggest that the challenge of the Winter Campaign will be to convince people to choose to celebrate winter activities rather than escape to a warmer climate. As such, it is important to target marketing efforts for the Winter Campaign toward the best possible audiences. In addition, it may make sense to start the Winter Campaign earlier and develop interest in Montana before people have time to decide to visit other locations.
- The profiling information indicates some specific targets that will generate the best results for Montana. The best geographic targets are northwestern and selected northern midwestern states, including Minnesota, Wisconsin and Michigan. While several other states generated leads and visitors, they did not perform as well given their populations.
- For the Ski market, the best targets are upscale, mature couples / empty nesters and single people. Given that some of the highest socio-economic PRIZM clusters are included in the target these are sophisticated, educated visitors, as illustrated by some of the cluster names – Blue Blood Estates, Upper Crust and Country Squires. Montana's best targets among these groups are likely to live in smaller towns and rural areas as opposed to large, urban areas.

- For the Snowmobile market, the best targets are more middle-of-the-road families. Again, these families are more likely to live in small towns and rural areas. The cluster names like Heartlanders, Simple Pleasures, Mayberry-ville, and White Picket Fences characterize this target. They will respond to family-oriented messages and are probably not looking for sophisticated or luxury experiences.
- These findings suggest that when people recall requesting information from Montana, and when they used the materials, a positive impact is made on the decision process. Most people are already interested in visiting Montana when they request information. Consequently, the info does not necessarily create the decision to visit. However, the information can help reinforce their level of interest and actually “convert” potential visitors. In addition, the information also helps increase trip duration which, in turn, results in greater economic benefit to the State. For the Winter Campaign, this impact was greater among responders to the Ski/Snowboarding Campaign, as about twice as many recalled requesting information.

APPENDIX

Travel Montana
Skiing/Snowboarding Conversion Study Questionnaire
Final – June 14, 2004

We are conducting a brief survey regarding travel and tourism. We would appreciate it if you could assist us in this research effort by completing this survey. Please let me assure you that no sales call will ever result from your participation and all your answers will be kept strictly confidential. The survey should take about 10 minutes to complete.

1. During the past year, did you travel to or through Montana?
 - 1...Yes
 - 2...No → **SKIP TO Q3**
2. Was Montana your PRIMARY vacation destination?
 - 1...Yes
 - 2...No
3. During the past year, did you take any trips of 200 miles or more that took you outside of your home state?
 - 1...Yes
 - 2...No → **if q1=2 & q3=2 skip to q24**
4. Overall, how likely are you to...? Would you say...?
 - 1...Very likely
 - 2...Somewhat likely
 - 3...Not at all likely

[] Use the internet for travel planning _____

[] Make reservations on-line _____

[] Purchase a travel package or special deal on-line _____
5. Did you request information from the state of Montana within the past year?
 - 1...Yes
 - 2...No → **SKIP TO INSTRUCTION BEFORE Q7**
6. What prompted you to request information from the state?
 - 1....I was thinking about taking a trip
 - 2....I wanted to get more information about the state
 - 3....I was already planning a trip
 - 4....Other, specify _____
- 6a. Do you recall any advertising or promotions you saw for Montana prior to requesting information?
 - 1...Television advertisement
 - 2...Magazine advertisement
 - 3...Mailing received at home
 - 4...Internet advertisement
 - 5...Search engine link
 - 6...Link on another internet site
 - 7...Magazine article
 - 8...Newspaper article
 - 9...Other, specify _____
 - 10...No, none

IF Q1=2 **SKIP TO Q22**
7. Did you decide to travel to Montana before or after you requested this information?

- 1...Before
 - 2...After
 - 3...Don't remember
8. How much or little influence did this information have on your decision to travel to Montana?
Would you say it had...?
- 1...A great deal of influence
 - 2...Some influence
 - 3...Very little, or
 - 4...No influence at all
9. Did the travel information influence the planning of the length of your stay for your travel to Montana?
- 1...Yes – Lengthened stay in Montana
 - 2...Yes – Shortened stay in Montana
 - 3...No – No effect on length of stay
10. The next few questions are about your MOST RECENT trip to Montana. What was the PRIMARY purpose of this trip?
- 1...Recreation and activities
 - 2...Sightseeing
 - 3...Relaxation and escape
 - 4...Visit historical sites/history museum
 - 5...Visit friends
 - 6...Visit family/family affairs
 - 7...Reunion
 - 8...Wedding
 - 9...Business, conference, or convention
 - 10...Combination of business and pleasure
 - 11...Medical reasons
 - 12...Just passing through
 - 13...Other (SPECIFY) _____
 - 14...Don't remember
11. What month was your most recent visit to the state?
- 1...Before September 2003
 - 2...September 2003
 - 3...October 2003
 - 4...November 2003
 - 5...December 2003
 - 6...January 2004
 - 7...February 2004
 - 8...March 2004
 - 9...April 2004
 - 10...May 2004
12. . How far in advance did you plan your trip?
- 1...Less than 1 month
 - 2...1 to 2 months
 - 3...2 to 4 months
 - 4...More than 4 months

13. Which of the following activities did you participate in, while in the state of Montana?

- 1...Downhill Skiing →ASK 13A
- 2...Snowboarding →ASK 13A
- 3...Cross Country Skiing →ASK 13B
- 4...Snowmobiling
- 5...Sightseeing
- 6...Visiting historic sites
- 7...Outdoor activities such as hiking or camping
- 8...Hunting
- 9..Other, specify _____

13a. Where did you go downhill skiing or snowboarding while in Montana?

ACCEPT MULTIPLE RESPONSES DO NOT READ

- 1...Bear Paw Ski Bowl
- 2...Big Mountain Resort
- 3...Big Sky Resort
- 4...Blacktail Mountain
- 5...Bridger Bowl
- 6...Discovery Basin
- 7...Great Divide
- 8...Lookout Pass Ski Area
- 9...Lost Trail Powder Mountain
- 10...Maverick Mountain
- 11...Moonlight Basin
- 12...Red Lodge Mountain Resort
- 13...Showdown
- 14...Snowbowl
- 15...Teton Pass
- 16...Turner Mountain
- 17..Other, specify _____

13b. Where did you go cross country skiing in Montana?

ACCEPT MULTIPLE RESPONSES DO NOT READ

- 1...B Bar Ranch
- 2...Beaverhead Deerlodge National Forest
- 3...Bigfork Nordic Center
- 4...Big Mountain Nordic Center
- 5...Bohart Ranch Ski Center
- 6...Elkhorn Hot Springs
- 7...Flathead National Forest
- 8...Gallatin National Forest
- 9...Glacier Nordic Center
- 10...Glacier National Park
- 11...Helena National Forest
- 12...Holland Lake Lodge
- 13...Izaak Walton Inn
- 14...Kootenai National Forest
- 15...Lewis & Clark National Forest
- 16...Lolo National Forest
- 17...Lone Mountain Ranch
- 18...McDonald Pass Trail System
- 19...Mount Haggin Nordic Ski Area
- 20...Mountain Meadows Guest Ranch
- 21...Red Lodge Nordic Center

- 22...Sundance Lodge
- 23...Wade Lake Resort
- 24...Yellowstone National Park
- 25..Other, specify _____

14. What was the primary form of transportation you used to get to Montana?
- 1...Plane
 - 2...Car, van or RV
 - 3...Bus
 - 4...Train
 - 5...Other (SPECIFY) _____
15. How many adults 18 years of age or older, including yourself, were in your immediate traveling party on your most recent trip? ENTER NUMBER: _____
16. How many children 17 years or younger were in your immediate traveling party on your most recent trip to Montana? ENTER NUMBER: _____
- 16a. Which best describes your travel group on your most recent trip to Montana?
- 1.....Friends
 - 2.....Family
 - 3.....Family and friends
 - 4.....Couple
 - 5.....Business Association
 - 6.....Organized group/club
 - 7.....By yourself
 - 8.....Other, SPECIFY _____
17. How many nights (OVERNIGHT) did you stay in Montana?
ENTER NUMBER: _____
18. What were your primary accommodations used while visiting Montana on your most recent trip?
- 1...Hotel or Motel
 - 2...Bed & Breakfast
 - 3...Resort
 - 4...Rental condominium or home
 - 5...Guest ranch
 - 6...Campground
 - 7...RV park
 - 8...Home of friends or relatives
 - 9...Your own vacation or second home
 - 10..Other (SPECIFY) _____
19. While you were in Montana, on average, about how much did you and your immediate traveling party spend per day in Montana, on each of the following? ENTER AMOUNT FOR EACH CATEGORY

	<u>Avg. spent per Day</u>
Lodging	_____
Meals/food/groceries	_____
Admission/Costs at attractions & parks Including rentals, lift tickets etc.	_____
Entertainment	_____
Shopping	_____

Transportation costs in Montana such as _____
Rental car, gasoline, taxis/shuttles etc. _____
Miscellaneous other things _____

20. Overall, how satisfied were you with your trip to Montana? Would you say you were...?
1...Very satisfied
2...Somewhat satisfied
3...Neither satisfied nor dissatisfied
4...Somewhat dissatisfied, or
5...Very dissatisfied
21. How likely would you be to take another trip to Montana? Would you say you would be...?
1...Very likely → **SKIP TO Q. 24.**
2...Somewhat likely → **SKIP TO Q. 24.**
3...Neither likely nor unlikely → **SKIP TO Q. 24.**
4...Somewhat unlikely, or → **SKIP TO Q. 24.**
5...Very unlikely → **SKIP TO Q. 24.**
22. Why did you choose not to visit Montana during the past year? **PROBE AND ACCEPT MULTIPLES**
1...Cost of air travel too expensive
2...Could not afford a trip/ other financial reasons
3...Did not receive information about Montana
4...No time for a trip
5...Personal or family illness/ problem
6...Montana not attractive or interesting
7...Visited another location instead of Montana
8...Prefer a location that's closer to home
9...Other reason (Specify) _____
23. Where did you visit on a trip that was over 200 miles away from home, and outside your home state? _____
24. In the next two years would you say you...?
1...Definitely will visit Montana
2...Probably will
3...Probably will not, or
4...Definitely will not visit Montana
25. In which season would you most likely visit Montana?
1...Winter
2...Spring
3...Summer
4...Fall
26. Please consider the following descriptions, and indicate how much each one describes Montana. We will be using a scale from 1 to 5, where 5 indicates it strongly describes Montana, and 1 indicates it does not describe Montana at all. You may use any number between 1 and 5
1..downhill skiing or snowboarding
2..cross country skiing
3...snowmobiling
4..winter sports, in general
5...camping/rv-ing

- 6...hiking or walking
- 7...fishing
- 8...hunting
- 9...mountains
- 10...rivers and lakes
- 11...photography
- 12...family and friends
- 13...recreational pursuits in general
- 14...visit historical sites/history/museums
- 15...natural beauty/scenery
- 16...visit national parks/sites
- 17...openness/open spaces
- 18...wildlife
- 19...calmness/relaxing/less traffic and/or stress
- 20...sense of adventure
- 21...visit Lewis & Clark sites
- 22...Western hospitality and friendliness

27. In the past five years, how many times have you been to Montana?

ENTER NUMBER OF TIMES _____

28. How interested would you be in visiting Lewis & Clark attractions or special events while on vacation in Montana? Would you say you...?

- 1...Definitely would be interested
- 2...Probably would be,
- 3...Probably would not, or
- 4...Definitely would not be interested

These last few questions are for grouping your responses with others similar to you.

29. What is your marital status?

- 1...Married
- 2...Divorced
- 3...Widowed
- 4...Single/never married

30. Are you female or male?

- 1...Female
- 2...Male

31. Including yourself, how many people are currently living in your household?

ENTER NUMBER: _____

32. How many children under the age of 18 do you have living at home?

ENTER NUMBER: _____

33. Which of the following categories best represents the last grade of school you completed?

- 1...High school or less
- 2...Some college/technical school
- 3...College graduate
- 4...Post graduate degree

34. Which of the following categories best represents the total annual income for your household before taxes?

2...under \$39,999

3...\$40,000 to \$59,999

4...\$60,000 to \$79,999

5...\$80,000 to \$99,999

6...\$100,000 to \$120,000

7...More than \$120,000

35. What is your age? ENTER AGE: _____

Thank you very much for taking the time to complete this survey!

Travel Montana
Snowmobile WEB Conversion Study Questionnaire
Final – June 14, 2004

We are conducting a brief survey regarding travel and tourism. We would appreciate it if you could assist us in this research effort by completing this survey. No sales call will ever result from your participation and all your answers will be kept strictly confidential. The survey should take about 10 minutes to complete.

36. Did you travel to or through Montana?

1...Yes

2...No → **SKIP TO Q3**

37. Was Montana your PRIMARY vacation destination?

1...Yes

2...No

38. During the past year, did you take any trips of 200 miles or more that took you outside of your home state?

1...Yes

2...No

IF Q1 = 2 and Q3 = 2, SKIP to Q25.

39. Did you request information from the state of Montana within the past year?

1...Yes

2...No → **SKIP TO INSTRUCTION BEFORE Q7**

40. What prompted you to request information from the state?

ACCEPT MULTIPLES

1...I was thinking about taking a trip

2...I wanted to get more information about the state

3...I was already planning a trip

4...Other, specify _____

6. Where do you recall any advertising or promotions you saw for Montana prior to requesting information?

1...Television advertisement

2...Magazine advertisement

3...Newspaper advertisement

4...Radio advertisement

5...Mailing received at home

6...Internet advertisement

7...Search engine link

8...Link on another internet site

9...Magazine article

10...Newspaper article

11...Other, specify _____

12...No, none

IF Q1=2 SKIP TO Q23

If Q4 = 2 SKIP TO Q10

7. Did you decide to travel to Montana before or after you requested this information?
 - 1...Before
 - 2...After (SKIP TO Q9)
 - 3...Don't remember

8. How much or little influence did this information have on your decision to travel to Montana? Would you say it had...?
 - 1...A great deal of influence
 - 2...Some influence
 - 3...Very little, or
 - 4...No influence at all

9. Did the travel information influence the planning of the length of your stay for your travel to Montana?
 - 1...Yes – Lengthened stay in Montana
 - 2...Yes – Shortened stay in Montana
 - 3...No – No effect on length of stay

10. The next few questions are about your MOST RECENT trip to Montana. What was the PRIMARY purpose of this trip?
 - 1...Recreation and activities
 - 2...Sightseeing
 - 3...Relaxation and escape
 - 4...Visit historical sites/history museum
 - 5...Visit friends
 - 6...Visit family/family affairs
 - 7...Reunion
 - 8...Wedding
 - 9...Business, conference, or convention
 - 10...Combination of business and pleasure
 - 11...Medical reasons
 - 12...Just passing through
 - 13...Other (SPECIFY) _____
 - 14...Don't remember

11. What month was your most recent visit to the state?
 - 1...Before September 2003
 - 2...September 2003
 - 3...October 2003
 - 4...November 2003
 - 5...December 2003
 - 6...January 2004
 - 7...February 2004
 - 8...March 2004
 - 9...April 2004
 - 10...May 2004

12. How far in advance did you plan your trip?

- 1...Less than 1 month
- 2...1 to 2 months
- 3...2 to 4 months
- 4...More than 4 months

13. Which of the following activities did you participate in, while in the state of Montana?

- 1...Downhill Skiing
- 2...Snowboarding
- 3...Cross Country Skiing
- 4...Snowmobiling→ASK 13A
- 5...Sightseeing
- 6...Visiting historic sites
- 7...Outdoor activities such as hiking or camping
- 8...Hunting
- 9..Other, specify _____

13A. Where did you go to snowmobile while in Montana?

- 1...Big Timber
- 2...Bozeman/Big Sky
- 3...Cooke City/Silver Gate
- 4...Cut Bank
- 5...Deerlodge
- 6...Dillon/Polaris
- 7...Elk Park
- 8...Flathead Valley
- 9...Garnet
- 10...Georgetown Lake
- 11...Hamilton/Skalkaho
- 12... Haugan
- 13... Helena
- 14... Kings Hill/Little Belts
- 15... Kootenai Country
- 16...Lincoln
- 17...Livingston
- 18..Lolo Pass
- 19...Mission Mountains
- 20...Seeley Lake
- 21..Virginia City/Ennis
- 22..West Yellowstone
- 23..Wisdom/Jackson/Sula
- 24..Wise River
- 25..Yellowstone National Park
- 26..Other, specify _____

13B. Did you visit places other than Montana during this trip?

- 1...YES
- 2...NO (SKIP TO Q13D)

13C. What other places did you visit?

- 1...Wyoming
- 2...Idaho
- 3...Canada
- 4...OTHER (SPECIFY)

13D. Did you rent snowmobiles in Montana or bring your own?

- 1...Rent
- 2...Own
- 3... Both

14. Yellowstone National Park issued new regulations this past year about the usage of snowmobiles within the park. Would you say...

- 1.....You were familiar with these new regulations prior to requesting information
- 2.....Learned about these changes after requesting information
- 3.....Are unfamiliar with these changed regulations

15. What was the primary form of transportation you used to get to Montana?

- 1...Plane
- 2...Car, van or RV
- 3...Bus
- 4...Train
- 5...Other (SPECIFY) _____

16. How many adults 18 years of age or older, including yourself, were in your immediate traveling party on your most recent trip? ENTER NUMBER: _____

17. How many children 17 years or younger were in your immediate traveling party on your most recent trip to Montana? ENTER NUMBER: ____

IF Q16 + Q17 = 1, SKIP TO Q18

17A. Which best describes your travel group on your most recent trip to Montana?

- 1...Friends
- 2...Family
- 3...Family and friends
- 4...Couple
- 5...Business Association
- 6...Organized group/club
- 7...By yourself
- 8...Other (Specify)

18. How many nights (OVERNIGHT) did you stay in Montana?

ENTER NUMBER: _____

19. What were your primary accommodations used while visiting Montana on your most recent trip?

- 1...Hotel or Motel
- 2...Bed & Breakfast
- 3...Resort
- 4...Rental condominium or home
- 5...Guest ranch
- 6...Campground
- 7...RV park
- 8...Home of friends or relatives
- 9...Your own vacation or second home

10..Other (SPECIFY) _____

20. While you were in Montana, on average, about how much did you and your immediate traveling party spend per day in Montana, on each of the following? ENTER AMOUNT FOR EACH CATEGORY

	<u>Avg. spent per Day</u>
Lodging	_____
Meals/food/groceries	_____
Admission/Costs at attractions & parks	_____
Including snowmobile rentals, etc.	_____
Entertainment	_____
Shopping	_____
Transportation costs in Montana such as	_____
Rental car, gasoline, taxis/shuttles etc.	_____
Miscellaneous other things	_____

21. Overall, how satisfied were you with your trip to Montana? Would you say you were...?

1...Very satisfied
2...Somewhat satisfied
3...Neither satisfied nor dissatisfied
4...Somewhat dissatisfied, or
5...Very dissatisfied

22. How likely would you be to take another trip to Montana? Would you say you would be...?

1...Very likely → **SKIP TO Q. 25.**
2...Somewhat likely → **SKIP TO Q. 25.**
3...Neither likely nor unlikely → **SKIP TO Q. 25.**
4...Somewhat unlikely, or → **SKIP TO Q. 25.**
5...Very unlikely → **SKIP TO Q. 25.**

23. Why did you choose not to visit Montana during the past year? PROBE AND ACCEPT MULTIPLES

1...Cost of air travel too expensive
2...Could not afford a trip/ other financial reasons
3...Did not receive information about Montana
4...No time for a trip
5...Personal or family illness/ problem
6...Montana not attractive or interesting
7...Visited another location instead of Montana
8...Prefer a location that's closer to home
9...Changes in regulations regarding snowmobiling in Yellowstone
10...Other reason (Specify) _____

24. Where did you visit on a trip that was over 200 miles away from home, and outside your home state? _____

25. In the next two years would you say you...?

1...Definitely will visit Montana
2...Probably will
3...Probably will not, or
4...Definitely will not visit Montana

26. In which season would you most likely visit Montana?
- 1...Winter
 - 2...Spring
 - 3...Summer
 - 4...Fall
27. Please consider the following descriptions, and indicate how much each one describes Montana. Please use a scale from 1 to 5, where 5 indicates it strongly describes Montana, and 1 indicates it does not describe Montana at all. You may use any number between 1 and 5
- 1..downhill skiing or snowboarding
 - 2..cross country skiing
 - 3...snowmobiling
 - 4..winter sports, in general
 - 5...camping/rv-ing
 - 6...hiking or walking
 - 7...fishing
 - 8...hunting
 - 9...mountains
 - 10...rivers and lakes
 - 11...photography
 - 12...family and friends
 - 13...recreational pursuits in general
 - 14...visit historical sites/history/museums
 - 15...natural beauty/scenery
 - 16..visit national parks/sites
 - 17..openness/open spaces
 - 18...wildlife
 - 19..calmness/relaxing/less traffic and/or stress
 - 20..sense of adventure
 - 21..visit Lewis & Clark sites
 - 22..Western hospitality and friendliness
28. In the past five years, how many times have you been to Montana?
ENTER NUMBER OF TIMES _____
29. Besides Montana, what other states or provinces have you taken snowmobiling trips?
- 1...Other specify
 - 2...Other specify
 - 3...Other specify
 - 4...Other specify
 - 5...NONE
30. How interested would you be in visiting Lewis & Clark attractions or special events while on vacation in Montana? Would you say you...?
- 1...Definitely would be interested
 - 2...Probably would be,
 - 3...Probably would not, or
 - 4...Definitely would not be interested
31. Overall, how likely are you to...? Would you say...?
- 1...Very likely
 - 2...Somewhat likely
 - 3...Not at all likely

- ☐ Use the internet for travel planning _____
- ☐ Make reservations on-line _____
- ☐ Purchase a travel package or special deal on-line _____

These last few questions are for grouping your responses with others similar to you.

- 32. What is your marital status?
 - 1...Married
 - 2...Divorced
 - 3...Widowed
 - 4...Single/never married
- 33. Are you female or male?
 - 1...Female
 - 2...Male
- 34. Including yourself, how many people are currently living in your household?
ENTER NUMBER: _____
- 35. How many children under the age of 18 do you have living at home?
ENTER NUMBER: _____
- 36. Which of the following categories best represents the last grade of school you completed?
 - 1...High school or less
 - 2...Some college/technical school
 - 3...College graduate
 - 4...Post graduate degree
- 37. Which of the following categories best represents the total annual income for your household before taxes?
 - 2...under \$39,999
 - 3...\$40,000 to \$59,999
 - 4...\$60,000 to \$79,999
 - 5...\$80,000 to \$99,999
 - 6...\$100,000 to \$120,000
 - 7...More than \$120,000
- 38. What is your age? ENTER AGE: _____

Thank you very much for taking the time to complete this survey!